

User Roles and Permissions Matrix Update

September 24, 2019

Table of Content


Content	Slide #
Roles and Permissions: General Overview	3-6
Campus Role Assignment: Recommendations	7-10
2019-20 Updates – Background, Purpose & District Feedback	11-14
2019-20 Updates – Role Specific Changes	15-17
Teacher	17-18
Student Data Assistant	19-20
Online Session Administrator	21-22
Online Test Administrator	23-24
Test Setup Assistant	25-26
Distribution of Permissions with Interim/Summative Crossover	27
User Roles and Permissions Matrix	28-32
Managing User Accounts	33-45
Managing User Roles	46-48

Roles and Permissions: General Overview

User Roles and Organization Hierarchy

- System is based on organizational hierarchy (region, district, campus) and role(s) assigned to each user
 - Permissions for actions (e.g., view student profiles) are assigned to a user based on their role(s)
 - District level users can access their permissions across all subordinate organizations (e.g., if they can view student profiles, they can see them across all campuses)

Roles and Permissions Matrix

<div>  <div> STAAR Assessment Management System User Roles and Permissions Matrix for Interim and Summative Assessments </div> </div>															
	ESC	District					Campus								
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District Account Assistant	District Technology Staff	Report View Only	Campus Testing Coordinator	Campus Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Dashboard Roles and Permissions															
Create & Delete Announcements			✓	✓											
View Student Transfer Announcements			✓	✓				✓							
View/Download Help Documents	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
View & Update User Profile (User's Own Account)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
View/download Interim Test Documents			✓	✓				✓							
Organizations Roles and Permissions															
Search and View Organizations		✓	✓	✓	✓	✓	✓				✓				✓
View Organization Addresses		✓	✓	✓				✓			✓				
Update Primary User		✓	✓	✓	✓			✓			✓				
User Roles and Permissions															
View User Accounts	✓	✓	✓	✓	✓	✓	✓				✓				✓
Add, Edit, Deactivate or Reactivate User Profiles	✓	✓	✓	✓	✓			✓			✓				
Upload New Users (via spreadsheet)			✓	✓	✓			✓							
Students Roles and Permissions															
View Student Profiles		✓	✓	✓				✓	✓	✓	✓	✓	✓		✓

<https://texasassessment.gov/administrators/technology/>

User Roles & Permissions: General Overview

Organization and User Roles Hierarchy

- Roles noted in **red** are permissioned in the system to create or edit subordinate roles
- Users cannot edit their own roles and organization affiliations

Region

Roles:

- **ESC Region Staff**

NOTES:

- Limited system functionality - access limited to regional reports
- Can create superintendents and DTCs for district located in their region

District

Roles:

- **Superintendent**
- **District Testing Coordinator**
- **District Testing Assistant**
- Report View Only
- Technology Staff

NOTES:

- DTC can create a superintendent role within their district
- DTC cannot create another account with a DTC role

Campus

Roles:

- **Campus Testing Coordinator**
- Test Setup Assistant
- Principal
- Online Test Administrator
- Online Session Administrator
- Student Data Assistant
- Teacher
- Technology Staff

User Roles & Permissions: General Overview

AskTed – Master File

- DTC/Superintendent accounts are automatically established in the Assessment Management System if updated in AskTed
- Updates in Assessment Management System made on a weekly basis
- Addition of a new DTC/Superintendent in AskTed does not remove/inactivate a prior DTC/Superintendent in the Assessment Management System
- Districts should maintain only one active DTC account in the Assessment Management System
 - District Test Assistant (DTA) role should be used for all other district staff needing DTC level access



User Roles & Permissions: General Overview

Primary User

- DTC of record is set to primary user by default
- Primary user receives system generated emails, and is the default recipient for order shipments
- Primary user may be changed to any other district level user as needed

The screenshot shows the 'STAR Assessment Management' interface. The left sidebar has 'Organizations' and 'View & Edit' options. The main content area is titled 'View & Edit Organizations' and shows details for 'DISTRICT, A A A_Do Not Use (000000000)'. It includes instructions on how to set the primary user and edit details. Below this, there's a tabbed interface with 'Users' selected, showing a list of 9 users. The 'SASSMAN, CHRISTY' user is marked as the primary user with a checkmark in the 'Primary' column.

Primary	Name	Email	Role	Status
<input type="checkbox"/>	Hensley, Janet	jhensley@caltesting.org	Superintendent	active
<input checked="" type="checkbox"/>	SASSMAN, CHRISTY	cmsassman@gmail.com	District Testing Coordinator	active
<input type="checkbox"/>	Ware, Emily	emilyware1@gmail.com	District Testing Coordinator	active
<input type="checkbox"/>	palayekar, lokesh	lpalayekar@ets.org	SUPERUSER	active
<input type="checkbox"/>	Chakraborty, Dibyendu	dibyendu20061988@gmail.com	District Testing Coordinator	active
<input type="checkbox"/>	reddy, avani	coolminds711@gmail.com	District Testing Coordinator	active
<input type="checkbox"/>	Schu, PJ	paulaschumacher@gmail.com	District Testing Coordinator	inactive
<input type="checkbox"/>	HAWKINS, TINA	tinahawkins@verizon.net	District Testing Coordinator	active

Best Practice: Verify primary User (Organizations > View & Edit - Users tab) and update as needed ahead of each administration

Determining Appropriate Roles: General Overview

- Assign role(s) based on your district/campus needs, not position title
 - e.g., “Principal” role has limited functionality to view campus report and access ORS. If a campus administrator needs greater access, they can be assigned any other role.
- Assign each user one role that provides them with the full level of access needed when possible (to simplify upload and management)
- Assign users to multiple campuses when needed
 - e.g., CTC at three different campuses, Teacher split between two campuses, etc.
- Permissions apply to both summative and interim assessments where crossover in functionality exists.
 - e.g., Print Test Tickets applies to both summative and interim

Campus Role Assignment: Recommendations

- **Teacher** – assign to teachers that are participating in interim assessments and need to monitor test status and view scores in ORS and/or need access to summative testing Teacher Rosters in the Teacher Portal.
 - Role does not provide access to critical system functionality used for summative testing and limited exposure to student PII
- **Student Data Assistant** – assign to campus staff that support interim assessments: verifying test registration and online testing status, access interim score results in ORS
 - Role does allow access to student PII (PEIMS IDs) across campuses for which users is associated with.

Campus Role Assignment: Recommendations

- **Online Session Administrator** – assign to campus staff involved in online administration support for both interim and summative assessment that **do NOT have a need to access student score results**
 - Provides access to print test ticket (secure test materials for summative administrations) and student PII for both summative and interim assessments
- **Online Test Administrator** – assign to campus staff involved in online administration support for both interim and summative, who **need access to interim score results** in ORS.
 - Provides access to print test ticket (secure test materials for summative administrations) and student PII for both summative and interim assessments

Campus Role Assignment: Recommendations

- **Test Setup Assistant**— assign to campus staff involved in registration activities and online administration support for both interim and summative assessments that do not have a need to access student score results
 - Provides ability to add, update, and delete registrations for both summative (Paper/online) and interim assessments (online), print test tickets, and access student PII for all students at their respective campus(es).
 - Allows access to critical system features with crossover between summative and interim assessments – only recommended for entrusted staff

2019-2020 Updates

Background:

- Roles originally established to maintain parity across the two Assessment Management Systems (Pearson and ETS)
- New system features and functionality, including interim assessments, have made efforts to maintain parity between the roles and permissions across the two applications less practical
- The Online Test Administrator (OTA) role was revamped in 2017-18 during the Interim pilot year to be used by teachers and other campus staff needing to administer interim tests and access results in ORS.
- Teacher role permissions were expanded in 2018-19 to match OTA permissions to further promote interim assessments as a classroom tool designed to support teaching and learning.
- 2018-2019 - Teacher Rostering introduced for summative testing

2019-2020 Updates

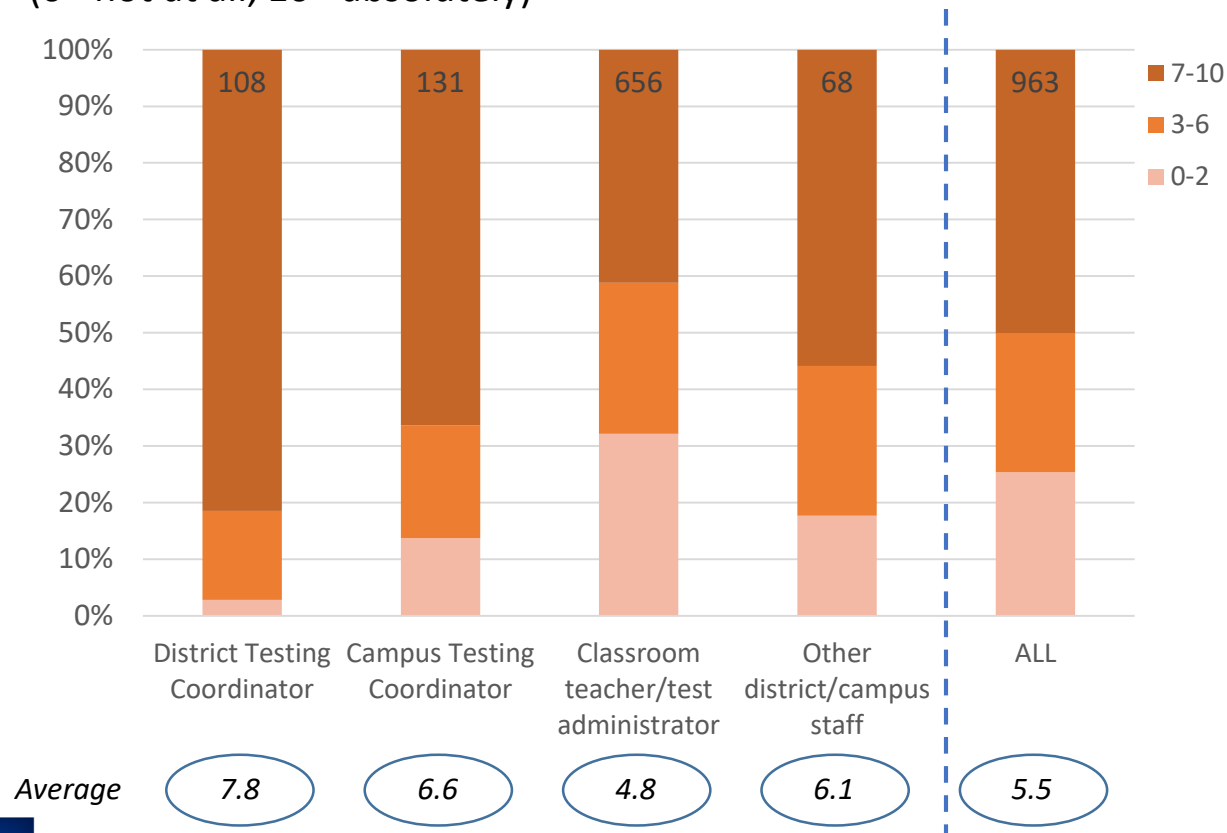
Reason for change – District Feedback:

- Permissions not specific to interim or summative testing – do not want staff involved with interim testing to have same level of access during summative administration activities. Need to manage user accounts (activate/inactivate) throughout year to limit access to critical summative crossover functionality.
- Access to ORS not limited to specific set of students – teachers and other staff with access to ORS can see results for all students within their organizational scope. Desire a way to allow teachers/staff to administer and/or monitor interim testing without giving access to ORS, or limit access to the scores of a specific roster of students.
- Current permissions provide teacher (role) access to student personally identifiable information (PEIMS IDs) - desire limited access to PII

2019-2020 Updates

Reason for change – Survey Feedback:

How likely would you be to recommend interim assessments to another educator?
(0= not at all, 10= absolutely)



Teachers less likely to recommend interims. Comments indicate a lack access to data.

- “If teachers don't have access to results, there is no way this will improve work of the students.”
- “I was not given access to the results and have not been able to use any data.”
- “Only one administrator from the campus had access [to the Online Reporting Suite] and she did not allow us to view online. Data was not available to teachers.”

District Feedback

Identified the following roles as candidates for change:

- Teacher
- Online Test Administrator (OTA)
- Online Session Administrator (OSA)
- Test Setup Assistant (TSA)
- Student Data Assistant (SDA)

Current Situation:

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Students Roles and Permissions (cont.)															
Upload Student Data File			✓	✓											
Transfer Students			✓	✓				✓							
Resolve Held Records (Resolutions)*			✓	✓											
Update Student Information*			✓	✓				✓							
Update Score Codes and Test Information*			✓	✓											
View Student Report Cards - (Scores Tab)*		✓	✓	✓											
Online Testing Roles and Permissions															
View Test Sessions and Student Testing Status		✓	✓	✓		✓		✓	✓	✓	✓		✓	✓	
Manage Testing Groups			✓	✓				✓							
Import Online Test Tickets			✓	✓				✓	✓	✓			✓		
Print Online Test Tickets and Rosters			✓	✓				✓	✓	✓			✓		
View District Level Session-at-a-Glance		✓	✓	✓		✓									
View Campus Level Session-at-a-Glance		✓	✓	✓		✓		✓	✓	✓	✓		✓	✓	
Do Not Report (DNR)/ Void Online Test*			✓	✓											
Set Test Attributes*			✓	✓				✓							
Create LCS Registration Keys*			✓			✓								✓	
Access Interim Testing Online Reporting Suite (ORS)^		✓	✓	✓				✓		✓	✓		✓		

2019-2020 Updates

Goal:

- Restructure Teacher, TSA, OSA, OTA, and SDA permissions to provide greater distinction and gradation between the campus level roles.
- Allow for combination of roles that in tandem allow districts greater choice when establishing campus level access and facilitates managing users accounts to control for interim/summative functionality crossover

2019-2020 Updates: Teacher Role

TEACHER – Role Summary

- Removed all permissions other than accessing Teacher Portal and ORS

NOTES:

- If no TSDS Staff ID associated with user account and/or a staff ID is not tied to a student registration – user effectively has no access to summative crossover functionality or student PII
- Teacher role can be combined with other roles to allow for additional campus level access

2019-2020 Updates: Teacher Role

TEACHER – Specific Changes

Removed:

- Print Test Tickets
- Import Test Tickets
- View Student Profiles
- Create new attempt (requires access to student profile)

Maintained:

- View online test sessions and student testing status
- View Student attempt history
- Access to ORS (ORS Rostering – Coming Soon)
- Access to Teacher Portal

2019-2020 Updates: Student Data Assistant

Student Data Assistant (SDA) – Role Summary:

- Access to ORS and viewing student profiles
- Use for instructional support staff needing access to interim results and monitoring students' online test status (e.g., instructional coaches, interventionists, etc.)
- Combine with teacher role to provide teacher access to view student profiles – register subsequent interim attempts within an opportunity.
- No ability to create/modify student registrations or access test tickets
- Does have access to Student PII across all students via registration data.

2019-2020 Updates: Student Data Assistant

SDA - Specific Changes:

Removed

- View Student Transfer Announcements
- Add, Edit, Delete Student Profiles
- Register Students

Maintained

- View student profiles
- View online test sessions and student testing status
- View Student attempt history

Added

- Download Campus Test Status (of Student) Report (online test status report)
- Access to ORS (in anticipation of Group Rostering in November)

2019-2020 Updates: Online Session Administrator

Online Session Administrator (OSA) – Role Summary:

- Expanded to match permissions of OTA – with exception of ORS access
- Provides access to Manage Online Testing features: Import Test Tickets and Print online Test Tickets.
- Does not include ability to manipulate student or test registrations, register students, or view assessment results
- Use in isolation for staff administer and monitor online administrations of interim and/or summative assessments that should not have access to any student score information or ability to edit registrations
- Can be added to teacher role

2019-2020 Updates: Online Session Administrator

OSA - Specific Changes:

Removed

- Search and View Organizations
- View Organization Addresses
- Update Primary User

Maintained

- View online test sessions and student testing status
- Import Online Test tickets
- Print Online Test Tickets and Rosters

Added

- Download Students Campus Report
- Download Campus Test Status (of student) Report

2019-2020 Updates: Online Test Administrator

Online Test Administrator (OTA) – Role Summary:

- Minimal changes from prior year permissions
- Provides access to Manage Online testing: Import Test Tickets and Print Online Test Tickets (not limited to interim testing)
- Does not include ability to manipulate student registration or test data, or register students.
- SAME as OSA permissions except has ability to access ORS

2019-2020 Updates: Online Test Administrator

OTA - Specific Changes:

Removed

- Search and View Organizations
- View Organization Addresses

Maintained

- View Student Profiles
- View Test Sessions and Student Testing Status
- Import Online Test Tickets
- Print Online Test Tickets and Rosters
- Access Interim Testing Online Reporting Suite (ORS)

Added

- Download Campus Test Status (of student) Report

2019-2020 Updates: Test Setup Assistant

Test Setup Assistant (TSA) – Role Summary

- Expanded to serve as an assistant role to CTC - similar to previous SDA role with additional permissions added to support online test administration)
- Provides full access to view & edit student/test registration data
- Allow for manual registration of students and create/edit groups
- Access to Manage online testing activities and online administration tools (e.g., set test attributes)
- Does not provide access to any assessment results data - can be combined with OTA to give additional access to ORS.

2019-2020 Updates: Test Setup Assistant

TSA - Specific Changes:

Removed

- Search and View Organizations
- Update Primary User

Maintained

- View Help Documents
- View and Update User Profile

Added

- View Student Profiles
- Add, Edit, and Delete Student Profiles
- Register Students (Manually)
- View Test Sessions and Student Testing Status
- Manage Testing Groups
- Import Online Test Tickets
- Print Online Test Tickets and Rosters
- Set Test Attributes
- Download Students Campus Report
- Download Campus Test Status (of student) Report

Distribution of Permissions with Interim/Summative Crossover

Permission/Role	CTC	Test Setup Assistant	Online Test Administrator	Online Session Administrator	Student Data Assistant	Teacher
View Student Profiles	X	X	X	X	X	
Add, Edit, Delete Student Profiles	X	X				
Register Student Manually	X	X				
View Test Sessions/Online Testing Status	X	X	X	X	X	X
Manage Testing Groups	X	X				
Import Online Test Tickets	X	X	X	X		
Print Online Test Tickets	X	X	X	X		
Download Student Registration Report	X	X	X	X	X	
Download Online Test Status Report	X	X	X	X	X	
Download Campus Reports*	X					
Access ORS*	X		X		X	X
Access Teacher Portal*	X					X

* No interim/summative crossover functionality

Updated Roles & Permissions

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Dashboard Roles and Permissions															
Create & Delete Announcements			✓	✓											
View Student Transfer Announcements			✓	✓				✓							
View/Download Help Documents	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
View & Update User Profile (User's Own Account)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
View/download Interim Test Documents			✓	✓				✓							
Organizations Roles and Permissions															
Search and View Organizations		✓	✓	✓	✓	✓		✓			✓			✓	
View Organization Addresses		✓	✓	✓				✓			✓				
Update Primary User		✓	✓	✓	✓			✓			✓				
User Roles and Permissions															
View User Accounts	✓	✓	✓	✓	✓	✓		✓			✓			✓	
Add and Edit User Profiles	✓	✓	✓	✓	✓			✓			✓				
Manage User Accounts via Upload File			✓	✓	✓			✓							

Updated Roles & Permissions

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Students Roles and Permissions															
View Student Profiles		✓	✓	✓				✓	✓	✓	✓	✓			✓
Add, Edit, and Delete Student Profiles			✓	✓				✓							✓
Register Students (Manually)			✓	✓				✓							✓
Upload Student Data File			✓	✓											
Transfer Students			✓	✓				✓							
Resolve Held Records (Resolutions)*			✓	✓											
Update Student Information*			✓	✓				✓							
Update Score Codes and Test Information*			✓	✓											
View Student Report Cards - (Scores Tab)*		✓	✓	✓											

Updated Roles & Permissions

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Online Testing Roles and Permissions															
View Test Sessions and Student Testing Status		✓	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓
Manage Testing Groups			✓	✓				✓							✓
Import Online Test Tickets			✓	✓				✓	✓	✓					✓
Print Online Test Tickets and Rosters			✓	✓				✓	✓	✓					✓
Do Not Report (DNR)/ Void Online Test*			✓	✓											
Set Test Attributes*			✓	✓				✓							✓
Create LCS Registration Keys*			✓			✓								✓	
Access Interim Testing Online Reporting Suite (ORS)^		✓	✓	✓				✓		✓	✓	✓	✓		

Updated Roles & Permissions

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Order Roles and Permissions															
View Initial Orders (Test Booklet Counts)*			✓	✓											
Order Additional Materials*			✓	✓											
View and Track Orders *			✓	✓				✓							
Order Late <u>Precodes</u> *			✓	✓											
Order Additional Reports*			✓	✓											
Order Rescore Requests*			✓	✓											
View and edit campus ADPL counts*			✓	✓				✓							
View ADPL/Scanned Answer Document counts*			✓	✓											

Updated Roles & Permissions

	ESC	District						Campus							
	ESC Region Staff	Superintendent	District Testing Coordinator	District Testing Assistant	District User Account Assistant	Technology Staff	Report View Only	Campus Testing Coordinator	Online Session Administrator	Online Test Administrator	Principal	Student Data Assistant	Teacher	Technology Staff	Test Setup Assistant
Reports Roles and Permissions															
Download Students Campus Report			✓	✓				✓	✓	✓		✓			✓
Download District Students Campus Report			✓	✓											
Download District Student Test Campus Report			✓	✓											
Download Student Transfer Report			✓	✓											
Download Students Braille Management Report*			✓	✓				✓							
Download Test Registration Report			✓	✓				✓							
Download Precocde Verification File/Report*			✓	✓				✓							
Access Student Assessment History Report*			✓	✓											
Request SIRS Report File*			✓	✓											
Download Test Mode/Material Counts Report*			✓	✓				✓							
Download Initial Order Quantity Report*			✓	✓											
Download District Test Status Report			✓	✓											
Download Campus Test Status (of student) Report			✓	✓				✓	✓	✓		✓			✓
Download Proctor Tickets*			✓	✓				✓							
View and Download Standard Reports*		✓	✓	✓			✓	✓			✓				
View and Download Consolidated Accountability File (CAF)*		✓	✓	✓											
Access Texas Data Portal* ^Δ	✓	✓	✓	✓				✓			✓		✓		
Report Access - Campus Standard Reports*		✓	✓	✓											
View and Download Interim District Data File		✓	✓	✓											
Access Interim Testing Online Reporting Suite (ORS) ^Λ		✓	✓	✓				✓		✓	✓	✓	✓		

Managing User Accounts

Best practices

- Establish process for identifying staff no longer employed by district, campus changes of staff, and staff role change needs
 - e.g., HR report of district/campus staff no longer with district
- Establish a user account maintenance schedule (weekly, quarterly, biennially, annually) to deactivate or change roles of user accounts as needed.
- Identify staff responsible for maintaining campus user roles (DTC, DTA, CTC only)
- Ensure system users are versed in FERPA compliance and have signed any statements/oaths outlining acceptable use of data as required per district policy

Managing User Accounts: Users Tab – Overview

Users

- View & Edit
- Add
- Upload

Key Functions

- View, and edit existing user accounts
- Add new user accounts
- Deactivate/Reactivate user accounts
- Reset user passwords
- Reset user credentials

The screenshot shows the STAR Assessment Management web application. The top navigation bar includes links for Students, Online Testing, Orders, Reports, Structure, and Admin. The 'Structure' link is highlighted with a red box. A dropdown menu is open for 'Structure', showing 'Organizations' and 'Users' (highlighted with a red box). A 'View & Edit' button is also visible in the dropdown. The left sidebar shows the 'Users' tab selected. The main content area has a search bar and a 'Search for a User to View and Edit' section with input fields for Keywords, First Name, Last Name, Username, Email, and TX-Unique-Staff-ID. There is also a dropdown for Status and a dropdown for Role. At the bottom right, there are 'Reset' and 'Search' buttons.

Managing User Accounts

User accounts may be managed individually via the user interface (UI) or via file upload.

Available Functionality:


Upload file	Individually in UI
<ul style="list-style-type: none">• Update user information• Update user roles/orgs• Deactivate account• Reactivate account• Create new account	<ul style="list-style-type: none">• Update user information• Update user roles/orgs• Deactivate account• Reset credentials / reset passwords• Create new account

Managing User Accounts: Search Existing User Accounts

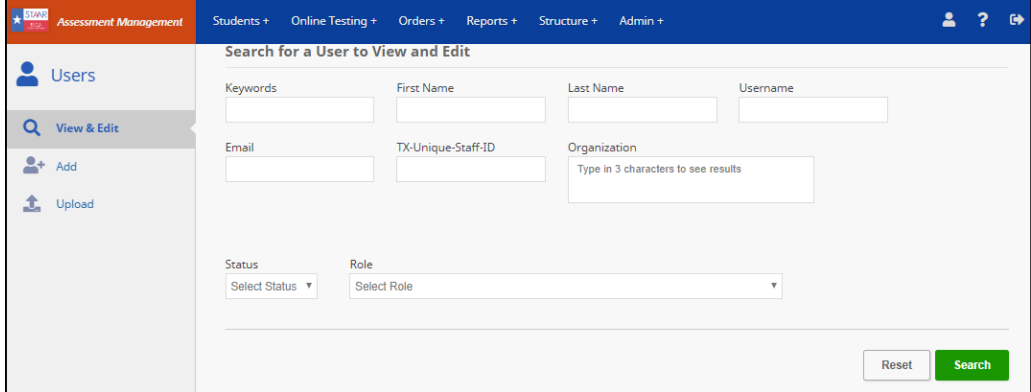
View & Edit User Accounts

- Enter search criteria and click **SEARCH**

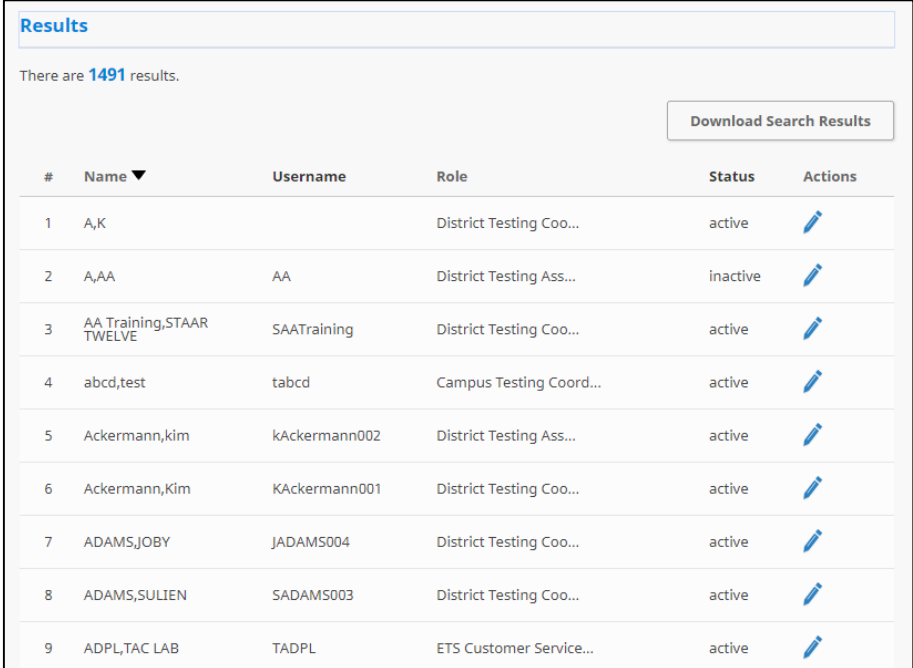
NOTE: Clicking **SEARCH** without entering any search criteria will return all users within a user's organizational scope

- Search results may be downloaded to aid in viewing and editing multiple accounts
- Click on the Edit icon  to enter a single user profile to review or to make changes










NOTE: User's may not view or edit their own accounts in search results



The screenshot shows the 'Assessment Management' interface. On the left is a sidebar with 'Users' selected, containing links for 'View & Edit', 'Add', and 'Upload'. The main area is titled 'Search for a User to View and Edit' and contains several search fields: 'Keywords', 'First Name', 'Last Name', 'Username', 'Email', 'TX-Unique-Staff-ID', and 'Organization' (with a note 'Type in 3 characters to see results'). Below these are dropdown menus for 'Status' (labeled 'Select Status') and 'Role' (labeled 'Select Role'). At the bottom right are 'Reset' and 'Search' buttons.



The screenshot shows the 'Results' section of the interface. It states 'There are 1491 results.' and includes a 'Download Search Results' button. Below is a table with columns: '#', 'Name', 'Username', 'Role', 'Status', and 'Actions'.

#	Name ▼	Username	Role	Status	Actions
1	A,K		District Testing Co...	active	
2	A,AA	AA	District Testing Ass...	inactive	
3	AA Training,STAAR TWELVE	SAATraining	District Testing Co...	active	
4	abcd,test	tabcd	Campus Testing Coord...	active	
5	Ackermann,kim	kAckermann002	District Testing Ass...	active	
6	Ackermann,Kim	KAckermann001	District Testing Co...	active	
7	ADAMS,JOBY	JADAMS004	District Testing Co...	active	
8	ADAMS,SULIEN	SADAMS003	District Testing Co...	active	
9	ADPL,TAC LAB	TADPL	ETS Customer Service...	active	

Managing User Accounts: Editing User Accounts (UI)

Edit an Individual User Account



Use the **View & Edit Users** page to make changes to a user's:

- **User Information:**


NOTE: UPDATE USER must be clicked to enact any demographic information changes

- **User Roles**

- **Click Add Role**

- Enter the organization name that user's new role is to be associated with

NOTE: Add Role must be clicked to save new role to user's account profile

- A dialogue box confirming the added role will appear
- The newly added role will appear in list of **User Roles** associated with the account
- Click the **Delete User Role** icon  to remove a role from the User Roles list

ETS Assessment Management | Students + | Online Testing + | Orders + | Reports + | Structure + | Admin +

Users

User Information

First Name * | Middle Name | Last Name * | Email *

Testing | | testing | test@test1888.com

TX-Unique-Staff-ID

Phone Number () | Number | Ext | Fax Number () | Number

User Roles

There are 1 roles associated with this user.

#	✓	Role	Organization	Actions
1	<input checked="" type="checkbox"/>	Campus Testing Coordinator	256999001: XANADU H S	

Update User | **Add Role**

Add Role

1 Select Organization | 2 Select Role

Select the organization to associate the user's role within the system. *

ETS UAT District 1 EL 5 [999999553]

ETS UAT District #1 New [999999000]

Select the User's Role

- ☒ Campus Testing Coordinator
- ☐ CTC Reports
- ☐ Online Session Administrator
- ☐ Online Test Administrator
- ☐ Principal
- ☐ Private School
- ☐ Student Data Assistant
- ☐ Teacher
- ☐ Technology Staff
- ☐ Test Setup Assistant

Cancel | **Add Role**

Confirmation: User Role

The role has been successfully added to the user's profile.

Close

Managing User Accounts: Editing User Accounts (UI)

Deactivate a User Account

Deactivate

- User accounts cannot be deleted from the system- only deactivated
- Once deactivated user's status will appear as *Inactive*
- A deactivated (inactive) user can only be reactivated by upload file or via the user interface (UI) by clicking the Reset Credential button that will appear in their profile
- A **View Deactivation History** link will appear on the deactivated user's profile indicating the date/time of the deactivation and the user that initiated the deactivation
- The deactivated user will receive an email notifying them of the status change to their account

The screenshot displays the ETS Assessment Management interface. The top navigation bar includes links for Students, Online Testing, Orders, Reports, Structure, and Admin. The left sidebar shows the 'Users' section with options to View & Edit, Add, and Upload. The main content area shows the 'User Roles' section for a specific user, with a table listing roles. A 'Deactivate' button is highlighted in the 'Actions' column. Overlaid on the interface are three dialog boxes: 1. 'Confirm: Deactivate' with the message 'Are you sure you want to deactivate the user?' and 'Cancel' and 'Deactivate' buttons. 2. 'Confirmation: Account Deactivated' with the message 'Account has been deactivated.' and a 'Close' button. 3. 'Deactivation History' showing the deactivation record for user RGross006, with a 'CLOSE' button.

#	✓	Role	Organization	Actions
1	<input type="checkbox"/>	Campus Testing Coordinator	256999001: XANADU H S	

Account Status

Deactivation Comment:

This account is active.

Confirm: Deactivate

Are you sure you want to deactivate the user?

Cancel Deactivate

Confirmation: Account Deactivated

Account has been deactivated.

Close

Deactivation History

Deactivation history for RGross006:

Fri Sep 01 01:19:20 EDT 2017 (deactivated by: RGross003) : no comment given

CLOSE

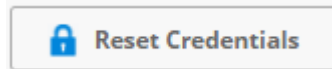
Managing User Accounts: Password/Credential Resets (UI)

Reset User Password

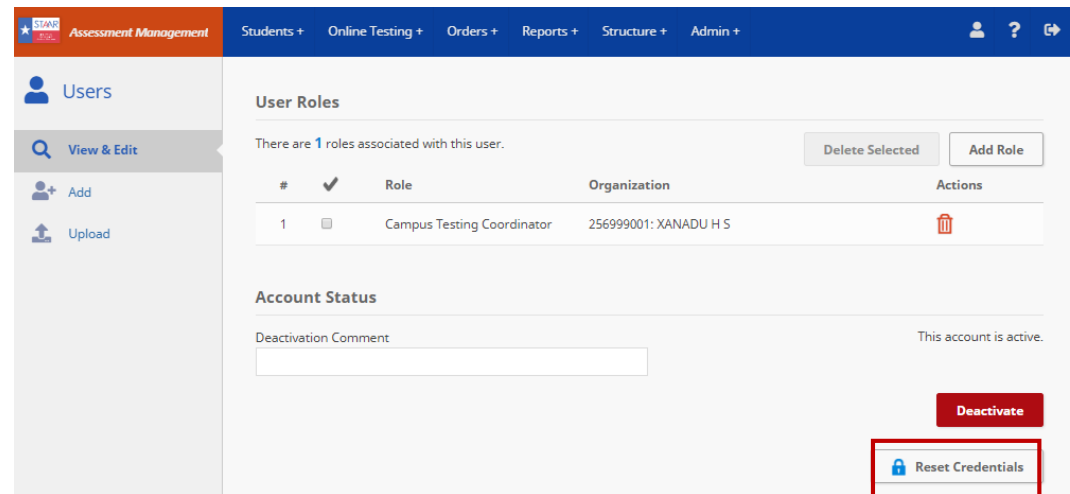
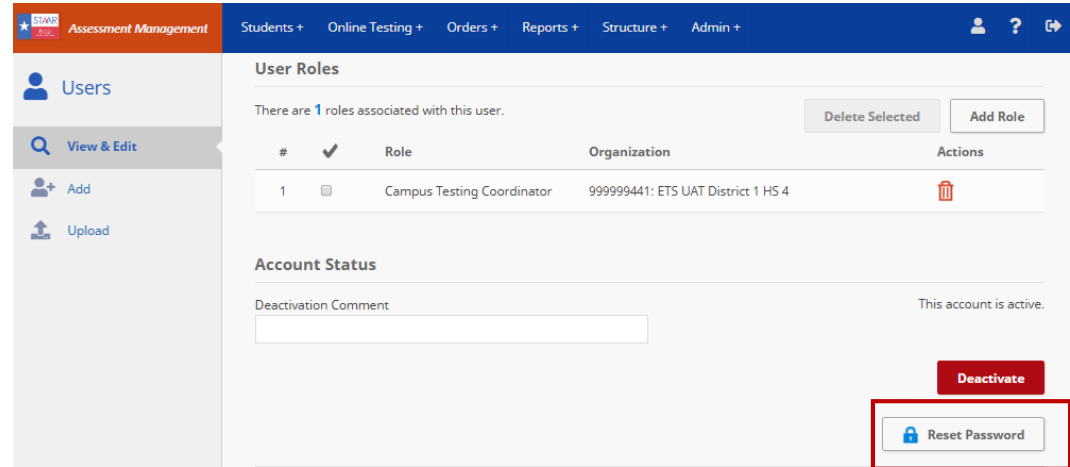


- Reset Password
 - An email will be sent to the user with information to reset their password
- Reactivate a user account

Reset User Credential



- A Reset User Credentials button will appear if a user has been deactivated and their prior password has auto-expired (365 days), or if the user failed to initially set up their permanent password within 10 days of being added as a new user.
- Once clicked the user will receive an email with information on reestablishing their account



Managing User Accounts: Create New User Account (UI)

Create a New User Account

- Enter in Demographic Data (email cannot already be in use by another user)
- Add role by entering the name of the organization and selecting a role from the list that appears then click Add Role (repeat to add additional roles within an organization or across multiple)

NOTE: Add Role must be clicked to save new role to user's account profile

The new user account will not be set up until the **SAVE** button is clicked

- Once saved, a pair of emails containing the user's ID and temporary password will be sent to the new user

The screenshot displays the 'Create New User Account' interface in the ETS Assessment Management system. The left sidebar shows the 'Users' section with options for 'View & Edit', 'Add', and 'Upload'. The main form area is divided into three sections:


- User Information:** Contains fields for First Name, Middle Name, Last Name, Email, TX-Unique-Staff-ID, Phone Number, and Fax Number.
- User Roles:** Includes a 'Select Organization' step (1) and a 'Select Role' step (2). Below these, there is a list of roles to select from: District Testing Assistant, District Testing Coordinator, District User Account Assistant, Report View Only, Superintendent, and Technology Staff. An 'Add Role' button is located at the bottom right of this section, highlighted with a red box.
- Associated User Roles:** Shows a table of roles associated with the user. The table has columns for #, Role, and Organization. One role is listed: District Testing Coordinator for ETS UAT District #1 New. A 'Delete Selected' button is at the top right of the table. A 'Save' button is located at the bottom right of the form, also highlighted with a red box.

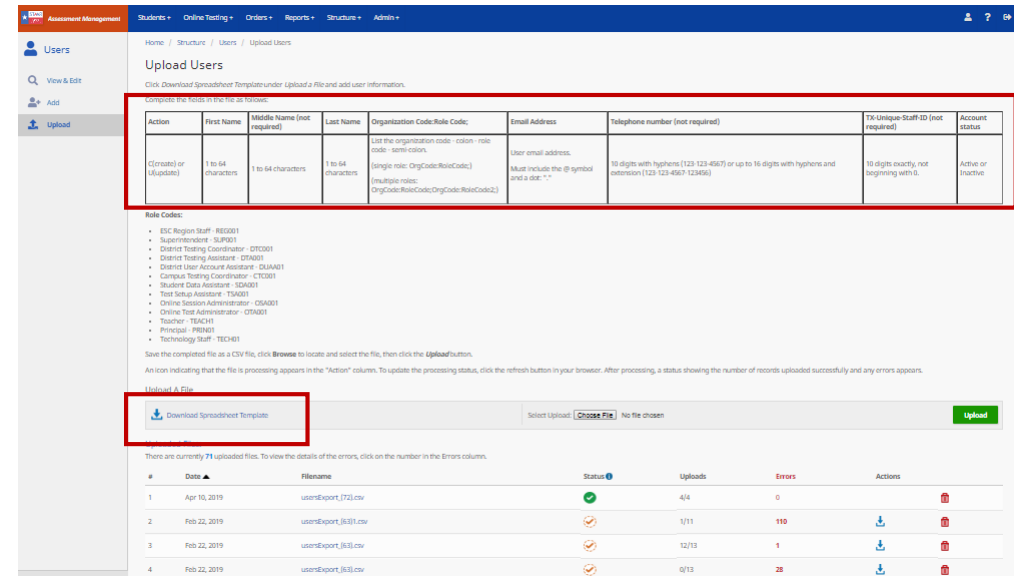
Managing User Accounts: Upload

Create or Edit User Accounts via Upload File

- **Download Spreadsheet Template** provides a .CSV with pre-populated column headers required for successful upload
- Data must be entered per the specifications indicated in the table at the top of the page

NOTE: A file containing existing users formatted properly for upload may be obtained from the *Users>View & Edit* page by clicking the **Download Search Results** button.

- Click **Browse** to select the prepared file and **Upload**
- Refresh the browser screen update the Status
 - The upload column indicates the number of records that successfully loaded
 - To identify records containing errors click on the red number in the *Errors* column or the **Download Errors** icon  in the *Actions* column
 - Both provide information detailing the row number in the file containing an error and identify the data causing the error



Action	First Name	Middle Name (not required)	Last Name	Organization Code/Role Code	Email Address	Telephone number (not required)	Tx Unique Staff ID (not required)	Account Status
Created or Updated	7 to 64 characters	1 to 64 characters	1 to 64 characters	List the organization code: colon - role code - semi colon. (Single role: OrgCode/RoleCode) (Multiple roles: OrgCode/RoleCode;OrgCode/RoleCode2)	User email address. Must include the @ symbol and a dot: " "	10 digits with hyphens (123 123 4567) or up to 16 digits with hyphens and extension (123 123 4567 123456)	10 digits exactly, not beginning with 0	Active or Inactive

Rule Codes:

- ETC Region Staff - RES001
- Superintendent - SUP001
- District Training Coordinator - DTC001
- District Training Assistant - DTA001
- District User Account Assistant - DUAA01
- Campus Training Coordinator - CTC001
- Student Data Assistant - SDA001
- Test Setup Assistant - TSA001
- Online Session Administrator - OSA001
- Online Test Administrator - OTA001
- Teacher - TRACH1
- Principal - PRN001
- Technology Staff - TEC001

Save the completed file as a CSV file, click **Browse** to locate and select the file, then click the **Upload** button.

An icon indicating that the file is processing appears in the "Action" column. To update the processing status, click the refresh button in your browser. After processing, a status showing the number of records uploaded successfully and any errors appears.

Download & Edit

[Download Spreadsheet Template](#)

Select Upload: [Choose File](#) No file chosen **Upload**

#	Date	Filename	Status	Uploads	Errors	Actions
1	Apr 10, 2019	usersExport_720.csv		4/4	0	
2	Feb 22, 2019	usersExport_8031.csv		1/11	110	
3	Feb 22, 2019	usersExport_8031.csv		12/13	1	
4	Feb 22, 2019	usersExport_8031.csv		9/13	28	

Example: Proper Format

A	B	C	D	E	F	G	H	I	J
1	Action	First Name	Middle Name	Last Name	Organization Code:Role Code;	Email Address	Telephone Number	Staff ID	Account Status
2	U	Ray		Gross	999996000:DTC001;	rgross71+TrainingDTC@gmail.com	512-814-9418		Active
3	U	Ray		Gross	ETS000001:ETS001;999996000:DTC001;	rgross71@gmail.com			Active
4	U	Ray		Gross	ETS000001:ETS005;999996000:SUP001;	raygross@yahoo.com	512-814-9418		Active
5	U	Ray		Gross	999996000:DTC001;	rgross71+confsldes@gmail.com			Active

Managing User Accounts: View & Edit

Download Search Results

Download Search Results

- Downloadable report returns a list of all users included in your search results along with accompanying account information
- Edits may be applied to one or more records directly in the report and uploaded back into the Assessment Management System to enact the changes
- Refer to the Upload Users page (*Users>Upload*) or the STAAR Assessment Management System User's Guide for more information on the file format specifications.

	A	B	C	D	E	F	G	H	I	J
1	Action	First Name	Middle Name	Last Name	Organization Code:Role Code;	Email Address	Telephone Number	TX-Unique-Staff-ID	Account Status	
2	U	Blake		Johnston	095901101:SDA001;095901001:SDA001;	bjohnston@SampleISD.com	111-111-1111		Active	
3	U	Cole	E	Hensley	184908000:DUAA01;100903101:SDA001;	cole@SampleISD.com	913-782-7694		Active	
4	U	Andrew		Lees	061901045:SDA001;	andyman_kansas@SampleISD.com			Active	
5	U	kevin		avent	057810101:SDA001;	taquierat@SampleISD.com			Active	
6	U	Chanon		Peterson	021805105:SDA001;	berry123@SampleISD.com			Active	
7	U	yulanda		carter	057810101:SDA001;	kevinanthony24@SampleISD.com			Active	
8	U	Si'Nya		Richard	015914101:SDA001;	sinyalee96@SampleISD.com			Active	
9	U	kevin		avent	057810101:SDA001;	dariusansley@SampleISD.com			Active	
10	U	James		Berry	061901045:SDA001;	emilyjames16@SampleISD.com			Active	
11	U	Jayvion		Brown	057810101:SDA001;	shirleycater65@SampleISD.com			Active	
12	U	ShawnLast		UATTester	061901045:CTC001;061901045:SDA001;	shawn101.westcovina@SampleISD.com			Active	
13	U	Ray		Gross	999999553:SDA001;	rgross71+wfdtc@SampleISD.com	512-814-9418		Active	
14	U	Paul		Miller	057810101:SDA001;	pxeycks+16@SampleISD.com			Active	

Working with upload file: File Specifications

Action	First Name	Middle Name (not required)	Last Name	Organization Code:Role Code;	Email Address	Telephone number (not required)	TX-Unique-Staff-ID (not required)	Account status
C(create) or U(update)	1 to 64 characters	1 to 64 characters	1 to 64 characters	List the organization code - colon - role code - semi-colon. (single role: OrgCode:RoleCode;) (multiple roles: OrgCode:RoleCode;OrgCode:RoleCode2;)	User email address. Must include the @ symbol and a dot: "."	10 digits with hyphens (123-123-4567) or up to 16 digits with hyphens and extension (123-123-4567-123456)	10 digits exactly, not beginning with 0.	Active or Inactive

Action- Enter "C" if creating new account or "U" if updating an existing account

Organization Code:Role Code; - at least one organization code (9 digit CDC) and role code combination separated with a ":" must be applied in a single string of text ending with ";" (no spaces in entire string)

TX Unique STAFF-ID – required to grant access to Teacher Portal rostering – (applicable to Teacher Role only)

Account Status – Enter Active to maintain an account in active status or when creating a new account, or to reactivate an inactive account

Working with upload file: File Specifications

Org Code:Role Code; - structure

- ***Teacher at 1 campus:***
999999001:TEACH1;
- ***Teacher at 2 campuses:***
999999001:TEACH1;999999002:TEACH1;
- ***Teacher Role combined with Student Data Assistant – same campus:***
999999001:TEACH1;999999001:SDA001;

NOTE: Teacher role can be combined with either SDA, OSA, OTA, or TSA roles to create specific level of access desired.

- Not recommended to combine other roles

Org Level / Role	Code
Region	
ESC Region Staff	REG001
District	
Superintendent	SUP001
District Testing Coordinator	DTC001
District Testing Assistant	DTA001
District User Account Assistant	DUAA01
District Technology Staff	
Reports View Only	
Campus	
Campus Testing Coordinator	CTC001
Student Data Assistant	SDA001
Test Setup Assistant	TSA001
Online Session Administrator	OSA001
Online Test Administrator	OTA001
Teacher	TEACH1
Principal	PRIN01
Technology Staff	TECH01

Managing User Access via upload file

	A	B	C	D	E	F	G	H	I	J
1	Action	First Name	Middle Name	Last Name	Organization Code:Role Code;	Email Address	Telephone Number	TX-Unique-Staff-ID	Account Status	
2	U	Blake		Johnston	095901101:SDA001;095901001:SDA001;	bjohnston@SampleISD.com	111-111-1111		Active	
3	U	Cole	E	Hensley	184908000:DUAA01;100903101:SDA001;	cole@SampleISD.com	913-782-7694		Active	
4	U	Andrew		Lees	061901045:SDA001;	andyman_kansas@SampleISD.com			Active	
5	U	kevin		avent	057810101:SDA001;	taquierat@SampleISD.com			Active	
6	U	Chanon		Peterson	021805105:SDA001;	berry123@SampleISD.com			Active	
7	U	yulanda		carter	057810101:SDA001;	kevinanthony24@SampleISD.com			Active	
8	U	Si'Nya		Richard	015914101:SDA001;	sinyalee96@SampleISD.com			Active	
9	U	kevin		avent	057810101:SDA001;	dariusansley@SampleISD.com			Active	
10	U	James		Berry	061901045:SDA001;	emilyjames16@SampleISD.com			Active	
11	U	Jayvion		Brown	057810101:SDA001;	shirleycater65@SampleISD.com			Active	
12	U	ShawnLast		UATTester	061901045:CTC001;061901045:SDA001;	shawn101.westcovina@SampleISD.com			Active	
13	U	Ray		Gross	999999553:SDA001;	rgross71+wfdtc@SampleISD.com	512-814-9418		Active	
14	U	Paul		Miller	057810101:SDA001;	pxeycks+16@SampleISD.com			Active	

Helpful Tools in Excel to update/manipulate upload file records:

- Text to Column
- Find and Replace
- Concatenate Function

Managing User Roles

Role Changes / User Account Management Scenarios:

- If previous role was Teacher and wish to maintain permissions available to a user with a teacher role previously
 - change to or add on Online Test Administrator (OTA) Role
- If would like Teacher to be limited to current functionality included in the updated roles and permissions matrix but also provide access to view student registration information and register for additional attempts
 - add Student Data Assistant to Teacher Role
- If currently have user with OTA role but would like to remove access to ORS
 - change to OSA (all permissions same across two roles except ORS access)

Managing User Roles

Role Changes / User Account Management Scenarios:

- If previously had a SDA role with full permission to register, edit, and deletes profiles
 - switch to TSA role

NOTE: Recommended only for staff who are entrusted with fully supporting registration and managing online test activities for both interim and summative

Questions?

